



# USER GUIDE (2)

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## PROFILES MODULE

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This symbol indicates a feature which is available with the 'Support' Upgrade

## **2.1. An introduction to the PROFILES module**

The 'Profiles' section of Tracker provides a valuable search, targeting and reporting tool for drilling down into the database of people and households at the heart of your software:

### **RESIDENTS AUTOMATICALLY LOADED AND UPDATED**

Tracker is linked to your main database so that new tenants are added, others are archived or core profiling data is updated automatically each week or more frequently if you prefer.

### **ADD RECORDS OF NON-RESIDENTS**

You can also easily manually add people who are not in your main database (non-residents you engage with, clients of service and support provided by you) directly into Tracker.

### **QUICK AND EASY LOOKUPS**

Individual records are really easy to look up so you can quickly identify a person's engagement history, profiling information and communication records.

'Quick Views' mean you can instantly see essential information on a person such as a phone number, allowing you to do your job faster.

Tracker focuses only on the information which is relevant to your tenant-interaction teams, so isn't cluttered up by other information from your Housing Management System making it quicker and easier to navigate around.

### **PROFILE INDIVIDUALS OR GROUPS**

As well as looking at individual profiles, this section allows you to identify and report on characteristics of groups as a whole (e.g. how many people of different tenancy types are involved). Tracker lets you easily flip between profiles of individuals, households and the properties they live in to give you a more holistic picture of your tenants.

Your Tracker site also allows you to add your own customisable fields for additional profiling information which may be useful to specific projects (e.g. a digital inclusion project might be interested in how many tenants had a home broadband connection).

You can identify groups of people who match any combination of demographics (e.g. age, interests etc.) and then either save the search results as a group or as a dynamic search template so projects can be easily targeted to specific groups.

### **ONSCREEN TABLES, GRAPHS AND REPORTS**

Tracker includes many dashboards which you can personalise to show the information you are most interested in. There is also a wide variety of on-screen tables, graphs and reports which are easy to manipulate.

Data exports into Excel then make it easy to include Tracker reports and analyses in your presentations and internal documents.

Once you get a feel for which functions and searches are really useful for you in this module you can choose up to eight profiling widgets to give you quick links and reporting figures instantly. These will be unique to you, saved and updated ready for you next time you log in.

## **2.2. Profiles module useful glossary**

### **ADMIN GROUP**

A list of people who are not necessarily linked to a specific involvement or engagement activity (e.g. Number of GN tenants on a specific date); this group is a fixed list of names so will not automatically reflect any changes in the people who match the initial search criteria. If you want Tracker to update your list automatically each time you use it, then use a 'Search template' as an alternative (see below).

### **SEARCH TEMPLATE**

A saved selection of search criteria (e.g. current residents of a specified address/sheltered scheme). Each time you use the template it will identify those who match the criteria at that time.

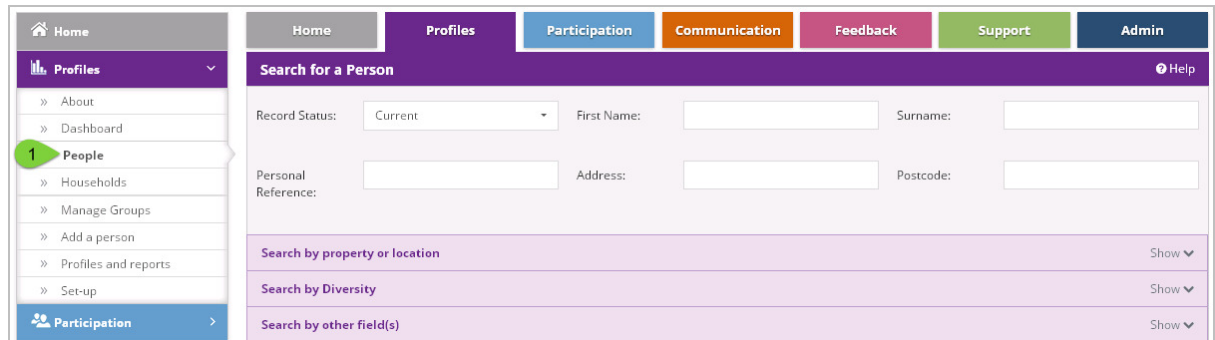
### **QUICK VIEW**

An instant overview of an individual tenant's key profile information: name, address, contact details, tenancy type, etc.

## 2.3. Finding a person

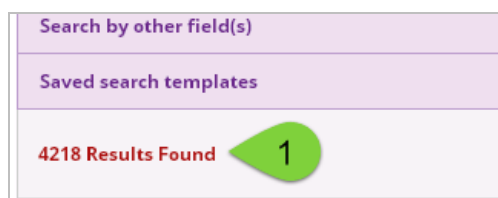
The Tracker database has a separate file for each person, holding information about their contact details, profile, preferences, activities, communications and history, plus any documents you have uploaded.

To find the file of a specific person, go to Profiles>People:

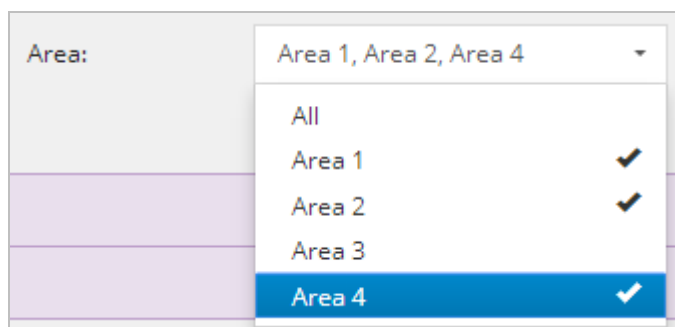


If you click 'Display' without using any of the search filters, you will see a table of ALL the people in the Tracker database.

It is usually easier to find the name you want by running your eye down a much shorter list, so filter the list by using any combination of the search fields available; the more filters you use, and the more specific the information you type in, then the shorter your list of search results will be. Tracker will tell you as you go how many records it has found:



In dropdown lists, you can select as many options as you wish to be included in your search:



Simply click on the options you require and a tick will appear against each of them. If you tick the 'All' option then all the individual options will automatically be ticked.

If you untick the 'All' option then all the individual options will be automatically unticked. To untick a ticked option, simply click on it again; the field will then show a list of all the options you have selected (which can be fitted within the view panel).

When you are happy with the search criteria click 'Display' to see the results in the table below; the tenant(s) matching the search criteria are then displayed showing 'Status', 'Personal ref', 'First name', 'Surname', and 'Address':

Status	Personal Ref	First Name	Surname	Address		
C	TEN1953	A	Mears	9 Scouts Corner	<a href="#">Quick View</a>	<a href="#">View</a>
C	TEN1294	A	Miller	49 Henry Close	<a href="#">Quick View</a>	<a href="#">View</a>
C	TEN1731	A	Minor	127 Meadows Road	<a href="#">Quick View</a>	<a href="#">View</a>
C	TEN0843	A	Mohr	119 Anderson Way	<a href="#">Quick View</a>	<a href="#">View</a>
C	TEN1241	A	Moor	120 Haden Way	<a href="#">Quick View</a>	<a href="#">View</a>

Click 'Quick View' to see a popup of the tenant's basic contact details:

Quick View

Show ▼

Reset Q Display

**Title:** Mr

**First Name:** A

**Surname:** Mears

**Address:** 9 Scouts Corner, NS4 6HT

**Phone (1):** 01333 412073

**Phone (2):**

**Email:** A@yacoo.coz.ukx

**Tenancy Type:** Co-resident

[Quick View](#) [View](#)

[Quick View](#) [View](#)

[Quick View](#) [View](#)

[Quick View](#) [View](#)

[Quick View](#) [View](#)

[Quick View](#) [View](#)

[Quick View](#) [View](#)

[Quick View](#) [View](#)

Or click 'View' to access their full record.

Home Profiles Participation Communication Feedback Support Admin

Mr A Mears, 9 Scouts Corner, Egguckland, PL2 6HT Help

Personal details Alternative contact Profile Activities Communications Groups Support Documents History

Details Address Property Details

## 2.4. A personal record

Each personal record contains a number of different tabs holding different types of information:

Home Profiles Participation Communication Feedback Support Admin

Mr A Mears, 9 Scouts Corner, Eggbuckland, PL2 6HT Help

Personal details Alternative contact Profile Activities Communications Groups Support Documents History

Details Address Property Details

### GREYED OUT FIELDS

The fields which are greyed out can be read but cannot be changed.

Details

Personal reference: TEN1835

Title: Mr

First name: A

Address

Address line 1: 17 Riverside Road

Address line 2:

This is because:

- **Either** the data in these fields is updated automatically by Tracker from your main housing management database; if the data is incorrect you need to update your housing management system and then the new data will appear here following the next update.
- **Or** you do not have authorisation to make these changes; discuss your authorisation levels with your Site Administrator.

### ALTERNATIVE CONTACTS

Tracker gives you a facility to record the details of a nominated alternative contact for a tenant. If the 'Alternative contact' tab has any details showing in any of the fields, Tracker will assume that the tenant should always be contacted through this nominated person.

Tracker will also show alerts to this effect on the 'Personal details' tab and on the 'Alternative contact' tab:

There are fields for recording the alternative contact's name, address, phone number and email address.

If you include the tenant in a communication list (e.g. a mailing list created through the 'Communications' module) then Tracker will automatically amend the list:

- Replace the tenant's name with the alternative contact's name followed by 'On behalf of <<tenant's name>>';
- Replace the tenant's address with the alternative contact's address.

## COMMUNICATION PREFERENCES

Within the 'Profiles' tab, you have the facilities to record a tenant's communication preferences which Tracker will then manage any survey or communication with that tenant:

The two panels of tick boxes cover:

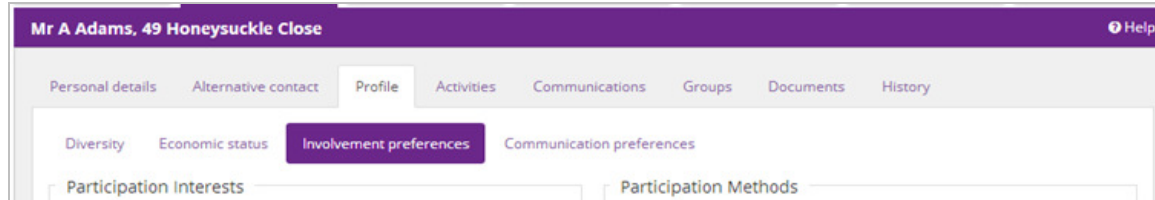
- Preferences linked to emails, text messages and mailings managed through the Communications module.
- Preferences linked to surveys managed through the Feedback module.

In each case there are standard options programmed so that if, for instance, 'no phone surveys' is ticked then this resident is automatically blocked by Tracker from being included in any telephone survey call lists.

The landlord can add other options but these will only appear for information only in searches and reports, they will not be 'programmed' into any specific Tracker functions.

## INTERESTS AND METHODS

Also within the 'Profiles' tab are facilities for recording a tenant's interests and preferred methods of involvement:



All the tick box options can be set up by the landlord to meet their own specific requirements:

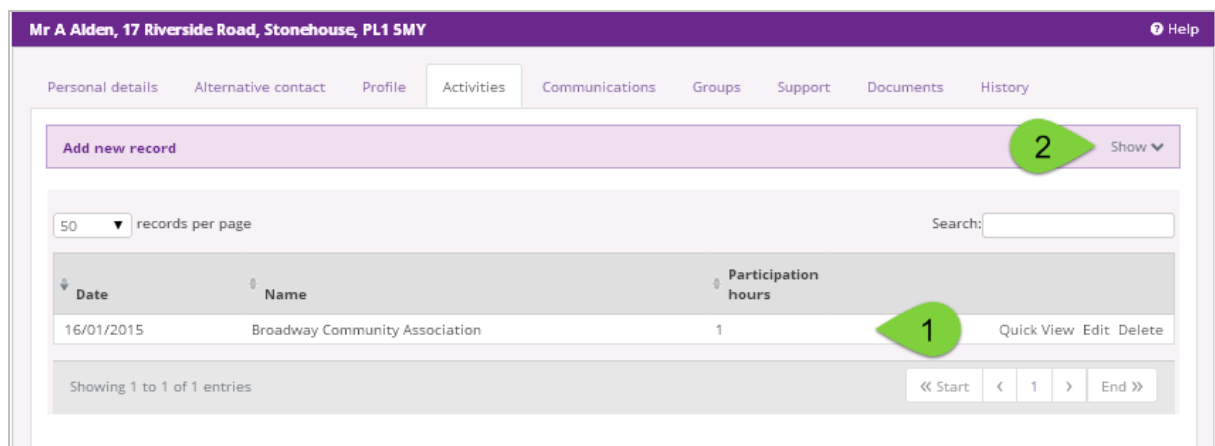
- 'Interests' are the subjects in which tenants may wish to get involved
- 'Methods' are options for the ways in which they may be prepared to engage with you.

These fields can be used elsewhere in Tracker to profile, search or report on tenants; expressing an interest here does NOT mean they have necessarily actually got involved; their involvement would only be recorded through 'Activity Records'.

## ACTIVITIES

This tab shows all the participation records relating to the tenant in a table (1), listed in order (most recent first) with buttons to give you access to a 'Quick view' of the record, an ability to edit it or to delete it.

You also have an option of creating new participation records relating to this person (only) via 'Add a new record' (2). Details of how to create a participation record can be found in 'User Guide (3) Participation'. *Note that to create multiple records for a number of different participants you will need to go to the 'Participation' module and create the records via the 'Activities' file.*



Date	Name	Participation hours	
16/01/2015	Broadway Community Association	1	Quick View Edit Delete

## COMMUNICATIONS

This tab shows all the communication records relating to the tenant in a table (1), listed in order (most recent first) with buttons to give you access to a 'Quick view' of the record, an ability to edit it or to delete it.

You also have an option of creating new communication records relating to this person (only) via 'Add a new record' (2). Details of how to create a communication record can be found in 'User Guide (4) Communications'.

*Note that communication records created here will cover messages sent NOT USING TRACKER; to include actually formatting and sending the communications you will need to use the 'Communications' module.*

Mrs A Bullivant, 94 Hampton Close, Devonport, PL2 5AH

Personal details Alternative contact Profile Activities **Communications** Groups Support Documents History

Add new record 2 Show ▼

50 records per page

Date	Reference	Type	Who With	
13/01/2015 15:51	Post/helene-beales/13/01/2015/	Mailing	Helene Beales	Quick View Edit <span>1</span>
13/01/2015 15:09	Post/helene-beales/13/01/2015/digi letter	Mailing	Helene Beales	Quick View Edit Delete
29/08/2014 15:31	Post/sandy-grange/29/08/2014/letter	Mailing	Sandy Grange	Quick View Edit Delete

Showing 1 to 3 of 3 entries

« Start < 1 > End »

## GROUPS

This tab shows all the groups ('Admin Groups' and 'Activity Groups') to which this tenant is linked in a table (1), listed in order (most recent first). You also have an option to link them to new groups via 'Link to a new group' (2).

Miss B Healy, 113 Station Road, Crownhill, PL2 9PW

Personal details Alternative contact Profile Activities **Groups** Support Documents History

50 records per page Search:

Name	Date Linked	Last Activity	Current Member
Broadway Community Association/2014-15	16/01/2015	15/10/2014	✓ <span>1</span>

Showing 1 to 1 of 1 entries

« Start < 1 > End »

Link to a new group 2 Show ▼

## SUPPORT



This tab is only available with the 'Support' upgrade. For details of its use see 'User Guide (6): Support'.

## DOCUMENTS

You can store documents relating to this tenant by browsing for one (1), giving it a 'Title' (2) and a brief summary of its contents (3) then uploading (4); documents can be in any format: Excel, Word, PDF, Photos, etc.

Stored documents are listed in the table and can be opened/viewed, edited or deleted at any time.

Document

Title

Summary

File

## HISTORY

This tab is for viewing only. It is a record of all the changes that have been made to core database fields so that you have an audit trail of who changed what and when.

It may also be helpful as record of the tenant's previous address, etc.

Miss B Healy, 113 Station Road, Crownhill, PL2 9PW

Personal details Alternative contact Profile Activities Communications Groups Support Documents History

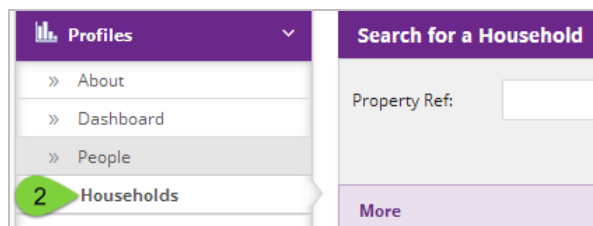
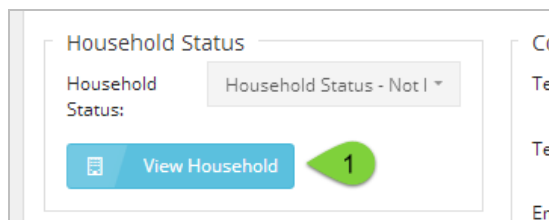
10 records per page Search:

Date	Field	Who By	Old Data	New Data
Sat Jan 17, 2015 2:24 PM	AddressLine3	TPUpdate	Townsville	Plymstock

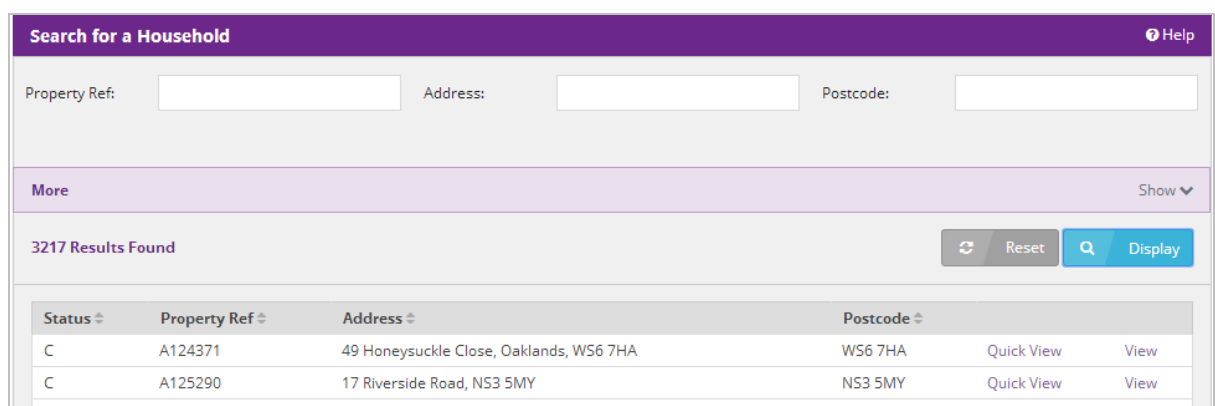
## 2.5. Finding a household

Tracker can give you information about a household (a group of people living at the same address); this can be accessed in two ways:

1. By clicking a link from someone's personal record to find details of the household they are part of, or
2. By going to Profiles>Households and searching for the household you require.



In option 2 above, use the search filters to home-in on the household you want and then select it from the table of search results:



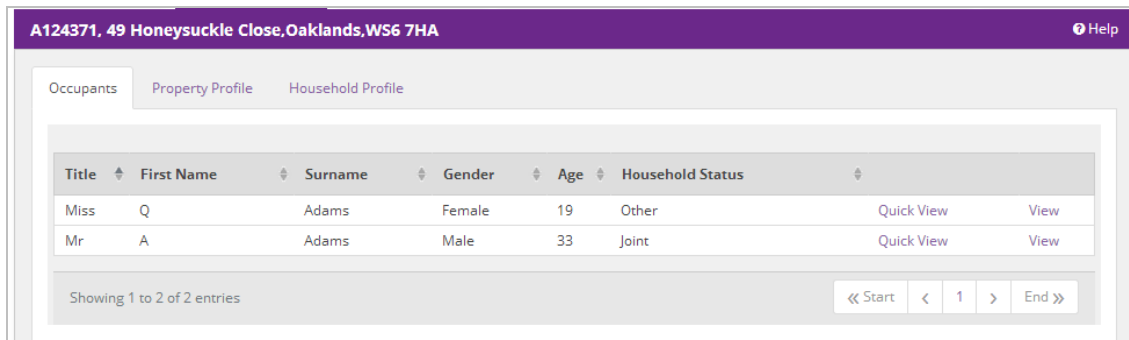
Status	Property Ref	Address	Postcode	Quick View	View
C	A124371	49 Honeysuckle Close, Oaklands, WS6 7HA	WS6 7HA	Quick View	View
C	A125290	17 Riverside Road, NS3 5MY	NS3 5MY	Quick View	View

Use the 'Quick view' for a snapshot of the household or click 'View' to access the full record.

## 2.6. A household record

Tracker identifies households and their occupants by matching their Property References or, if they have no Property References, by matching their concatenated (joined together) address fields (Address1,2,3,4 + Postcode).

There are three tabs available within a household file: Occupants, Property profile and Household profile:



Title	First Name	Surname	Gender	Age	Household Status		
Miss	Q	Adams	Female	19	Other	Quick View	View
Mr	A	Adams	Male	33	Joint	Quick View	View

Showing 1 to 2 of 2 entries

« Start < 1 > End »

### OCCUPANTS TAB

Tracker identifies all the people living at the same address or property reference and shows them in a simple table with some basic profiling data for each. For more detail, click 'View' to go to the tenant's full personal record.

### PROPERTY TAB

You can use this to create a profile of the property using your own custom profiling fields; for example, the type of property, number of bedrooms, availability of broadband, parking facilities, etc. This is intended for data which would no longer be relevant to the people in the household if they were to move elsewhere.

### HOUSEHOLD TAB

You can use this to create a profile of the family or household using your own custom profiling fields; for example, any pets, family income and benefits which cannot be linked to an individual household member, etc. This is intended for data which may still be relevant to the people in the household if they were to move elsewhere.

## 2.7. Profiles and reports

If the graph, table, profile or analysis you need is not available through one of the standard Dashboard options, then you can create your own bespoke profile, report or analysis at Profiles>Profiles and reports. The process comprises four simple steps:

Step 1: Select the records or people to be included in the analysis;

Step 2: Define the format of the report you require;

Step 3: View the report on screen and drill down for more detail if required;

Step 4: Download the report, data tables or graphs as required.

### STEP 1: SELECT THE RECORDS

Use the most appropriate filters from the wide range of options available:

Select people to be included in report/profile	Help
Personal Details	Show ▼
Personal Details - Diversity	Show ▼
Personal Details - Economic Status	Show ▼
Personal Details - Involvement Preferences	Show ▼
Personal Details - Communication Preferences	Show ▼
Activities	Show ▼
Communications	Show ▼
Groups	Show ▼
Saved Templates	Show ▼

4192 Results Found

Reset

Save as a new search template

View report/profile

When you have created a set of filters for use in selecting or searching for a group of people, you have an option to save the settings as a 'Search template'.

This means that you can quickly create the same set of filters at any time by using your saved 'Search Template' instead of having to reselect the exact same combination of filters individually. This saves time but also ensures you get exactly the same set each time.

#### 'Search template' or 'Group'?

If you create an 'Admin Group' the same people will be selected each time. For example if you create a 'Group' of all the people living in a certain sheltered scheme at a particular time, Tracker will automatically remove anyone who becomes 'Archived' but WILL NOT AUTOMATICALLY UPDATE the Group' by removing anyone who moves elsewhere or adding new residents of the scheme.

You can create new Admin Groups or amend existing ones via the Profiles> Manage Admin Groups.

## STEP 2: REPORT FORMAT

Tracker provides a set of standard on-screen report options which can be selected using the dropdown list:

**Report**Help

Field Option: Tenancy Types Update Table

25 records per page Filter Y-axis:

Tenancy Type	Total	Male	Female	<16	16 to 44	45 to 64	65+	WB	BME	With Disability	No Disability
Co-resident	671	252	419	243	74	329	25	194	137	74	1
General tenant	2109	1256	852	0	640	992	477	557	474	214	6
Lease holder	771	317	454	0	683	43	45	358	160	72	4
Supported OAP	638	311	327	0	0	7	631	306	147	60	2
Supported Other	5	4	0	0	2	2	0	3	0	1	0

Showing 1 to 5 of 5 entries « Start < 1 > End »

CSV Export Records Export Table

If you change the field option, click 'Update Table' to see the revised data and format.

Use the buttons at the bottom of the screen for Steps 3 and 4: export the on-screen table or export all the records behind the table.

## 2.8. Manage Admin Groups

### WHAT IS A 'GROUP'?

In Tracker 'Groups' are defined in two ways:

#### (1) 'Activity Groups'

These are lists of people that are linked to specific 'Activities'. They may be (a) manually linked by a user because they have (e.g.) joined a Panel, or (b) automatically linked by Tracker because they have a 'Participation Record' (see below) for the 'Activity'.

*These groups are created through the 'Participation' module – see User Guide (3) for help with these.*

You can manually link/unlink a person to an Activity Group via the 'Groups' tab in their personal file.

#### (2) 'Admin Groups'

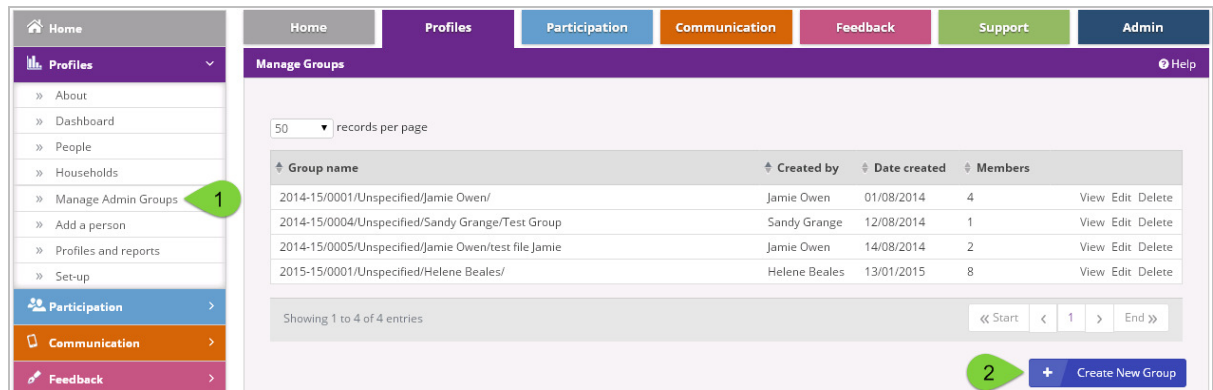
These are lists of people that are not linked to any 'Activities'. The Group will be set up manually by a user, given a unique group name and assigned as linked to an 'Unspecified' Activity. These groups may be created as administrative or operational 'short cuts'.

*However, before creating a group like this, you may like to consider whether setting up a 'Search Template' could be more useful.*

If you want to set up for example a list of all the people living at a sheltered housing scheme, the differences would be as follows; there are pros and cons for each option and the choice is yours:

- **GROUP:** A list of specific people which will require manual amendment each time someone joins or leaves the scheme; difficult to be sure it is always up to date.
- **SEARCH TEMPLATE:** A set of search criteria (e.g. all the 'current' tenants at a specific address) which will reselect the appropriate people each time it is used and therefore will be always up to date.

## CREATING A NEW 'ADMIN GROUP'

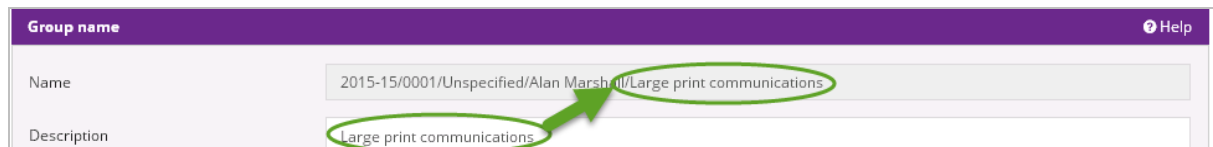


The screenshot shows the 'Manage Groups' interface. The left sidebar has a 'Profiles' section with a dropdown menu where 'Manage Admin Groups' is selected, indicated by a green circle with the number 1. The main content area displays a table of groups with columns: Group name, Created by, Date created, and Members. Below the table, there is a pagination bar showing 'Showing 1 to 4 of 4 entries'. At the bottom right, a green circle with the number 2 highlights the '+ Create New Group' button.

Group name	Created by	Date created	Members
2014-15/0001/Unspecified/Jamie Owen/	Jamie Owen	01/08/2014	4
2014-15/0004/Unspecified/Sandy Grange/Test Group	Sandy Grange	12/08/2014	1
2014-15/0005/Unspecified/Jamie Owen/test file Jamie	Jamie Owen	14/08/2014	2
2015-15/0001/Unspecified/Helene Beales/	Helene Beales	13/01/2015	8

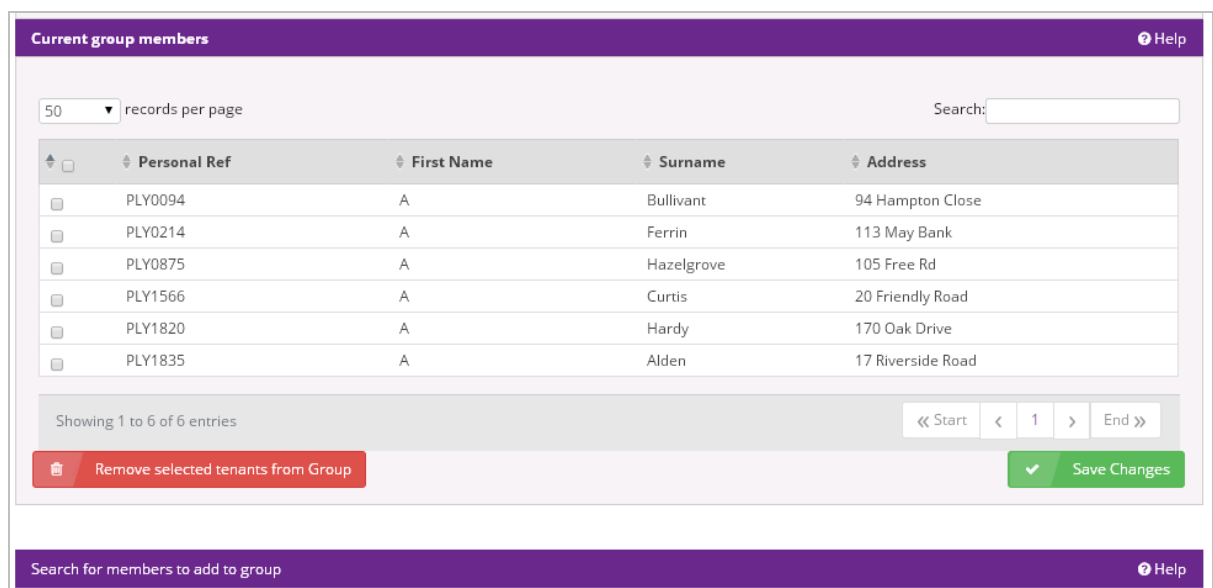
You can only create or amend 'Admin Groups' here which are classified as 'Unspecified' in relation to 'Activities' ('Activity Groups' are linked to specified Activities and are created automatically by Tracker as soon as the Activity is created and people are linked to it.

Give your Group a description which will be included as part of the 'Group Reference':



The screenshot shows the 'Create New Group' form. The 'Name' field contains the text '2015-15/0001/Unspecified/Alan Marshall/Large print communications'. The 'Description' field contains the text 'Large print communications'. A green arrow points from the 'Description' field to the 'Name' field, indicating that the description is part of the group reference.

Search for the people you want to include in the group using the range of search fields available.



The screenshot shows the 'Current group members' page. It features a table with columns: Personal Ref, First Name, Surname, and Address. Below the table, there is a pagination bar showing 'Showing 1 to 6 of 6 entries'. At the bottom, there is a red button labeled 'Remove selected tenants from Group' and a green button labeled 'Save Changes'. A search bar is located at the top right of the page.

Personal Ref	First Name	Surname	Address
PLY0094	A	Bullivant	94 Hampton Close
PLY0214	A	Ferrin	113 May Bank
PLY0875	A	Hazelgrove	105 Free Rd
PLY1566	A	Curtis	20 Friendly Road
PLY1820	A	Hardy	170 Oak Drive
PLY1835	A	Alden	17 Riverside Road

Click 'Save Changes' to create and save your Group.

## ADD OR DELETE GROUP MEMBERS

You can manually link new people to a group: select the Group and click 'Edit' (1):

All Groups				Help
10	records per page	Search:		
Group name	Created By	Date created	Number of members	
Alan's 105 Group	Sandy Grange	20/04/2014	3	1 Edit Delete
Group This	James Mackay	07/02/2014	11	View Edit Delete

Search for the people you want to add, display your search results (2) and then tick to include them (3):

Search by other field(s)				Show
4189 Results Found				2
3	Personal Ref	First Name	Surname	Address
<input type="checkbox"/>	TEN1835	A	Alden	17 Riverside Road
				Quick View View

The list of group members, including those you have just added will show at the top of your screen:

Current group members					Help
<input type="checkbox"/>	Personal Ref	First Name	Surname	Address	
<input type="checkbox"/>	TEN0916	A	Adams	49 Honeysuckle Close	
<input checked="" type="checkbox"/>	TEN0707	A	Aldridge	196 Baker Way	
<input type="checkbox"/>	TEN0287	A	Allen	8 Meadows Road	
Remove selected tenants from Group					5
					6 Save Changes

To remove people from the list, tick the person who you want to remove (4) in the list of current group members and then click 'Remove' (5); when your list reflects the desired names, click 'Save changes' (6).

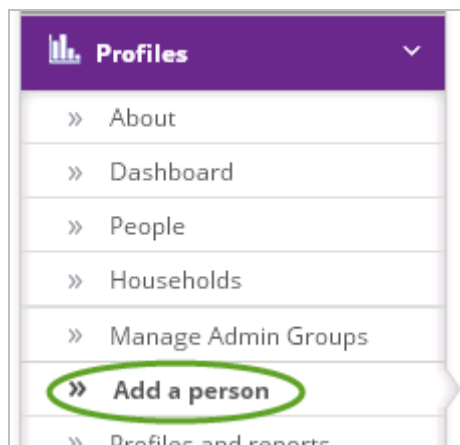
*You can also manually link/unlink a person to an Admin Group via the 'Groups' tab in their personal file.*

## 2.9. Manually adding people to your Tracker database

If your Tracker database is linked to your main database, there will be restrictions on who you can add manually to Tracker. This is controlled by the 'Tenancy Type' field:

- If people with a certain 'Tenancy Type' are normally added to Tracker via the automated link to your main database, Tracker will prevent you from adding them manually here. You will have to add them to your main database and then they will be automatically added to Tracker as part of the next scheduled data transfer.
- You can only add people manually to Tracker if their 'Tenancy Type' is one which is not included in the automated data transfer. Generally this applies to 'Non-residents': people who are not your residents and not included in your main database but with whom you are engaging.
- If you do not have appropriate 'Tenancy Type' options available, please call the Support Desk (01603 813932) and they will be able to set them up for you there and then.

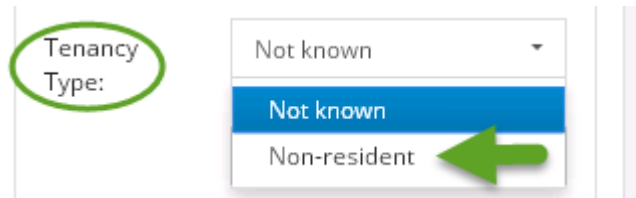
To add a person to the Tracker database go to Profiles>Add a person:



You will then see a blank template for you to enter whatever details you have about the person.

## TENANCY TYPE

In the 'Tenancy Type' field you will only be able to select the options which are available for manually created records:



## PERSONAL REFERENCES

In the setup options for your Tracker site you can choose one of two options for creating the Personal References for new people added manually to the database:

1. Manually add a Personal reference of your choice:

The disadvantages are that you may create a Personal Reference that is already in use or that you may waste time trying find out the next available sequence number.

2. Get Tracker to automatically add the Personal Reference for you:

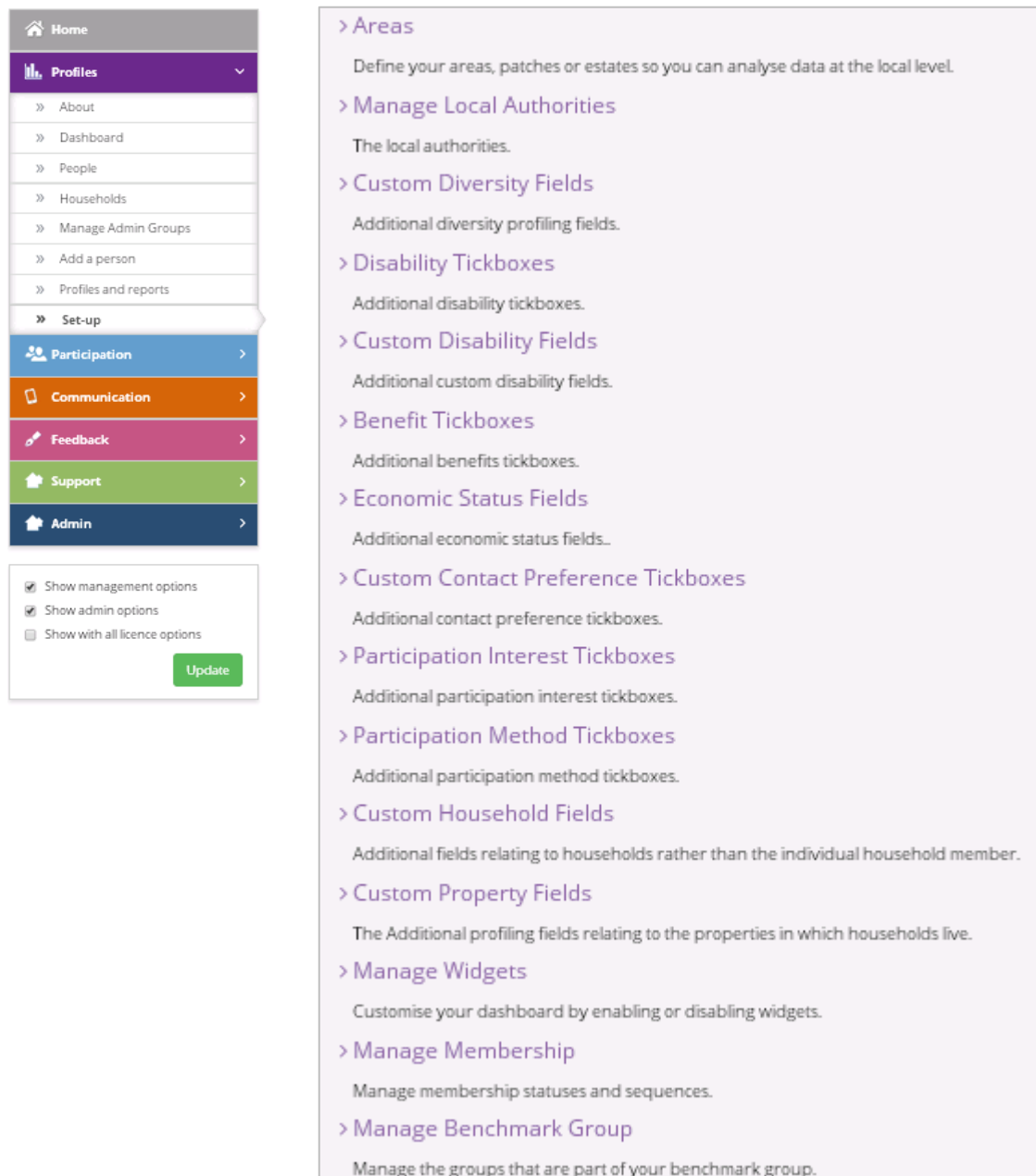
You set up the format and starting number of the Personal References for any given Tenancy type and Tracker will then automatically identify the next one in sequence to allocate.

With option (2) the Personal Reference field will be greyed out so you cannot manually over-ride Tracker's choice.

For help with setting up the Personal Reference format and starting number for each Tenancy type, call the Support desk on 01603 813932 and they will do it for you there and then.

## 2.10. Back office set up

Go to 'Profiles>Set up' for access to the set up options for a wide range of fields in this module. This allows you to manage your own dropdown lists and field options so Tracker reflects the needs of your own organisation:



The screenshot displays the Tracker back office interface. On the left is a vertical navigation menu with the following items: Home, Profiles (selected), About, Dashboard, People, Households, Manage Admin Groups, Add a person, Profiles and reports, Set-up (highlighted), Participation, Communication, Feedback, Support, and Admin. Below the menu are three checkboxes: 'Show management options' (checked), 'Show admin options' (checked), and 'Show with all licence options' (unchecked), followed by an 'Update' button. The main content area on the right lists various setup options, each with a brief description:

- > **Areas**  
Define your areas, patches or estates so you can analyse data at the local level.
- > **Manage Local Authorities**  
The local authorities.
- > **Custom Diversity Fields**  
Additional diversity profiling fields.
- > **Disability Tickboxes**  
Additional disability tickboxes.
- > **Custom Disability Fields**  
Additional custom disability fields.
- > **Benefit Tickboxes**  
Additional benefits tickboxes.
- > **Economic Status Fields**  
Additional economic status fields.
- > **Custom Contact Preference Tickboxes**  
Additional contact preference tickboxes.
- > **Participation Interest Tickboxes**  
Additional participation interest tickboxes.
- > **Participation Method Tickboxes**  
Additional participation method tickboxes.
- > **Custom Household Fields**  
Additional fields relating to households rather than the individual household member.
- > **Custom Property Fields**  
The Additional profiling fields relating to the properties in which households live.
- > **Manage Widgets**  
Customise your dashboard by enabling or disabling widgets.
- > **Manage Membership**  
Manage membership statuses and sequences.
- > **Manage Benchmark Group**  
Manage the groups that are part of your benchmark group.

Click on a menu option and follow the instruction on screen to create, edit or delete a field or dropdown option.

## **GENERAL RULES**

**DELETING:** You can only delete an option while it has not been used; once there is a record in the Tracker database using this option you cannot delete it.

**ARCHIVING:** Tick an 'Archive' tick-box to hide an option from further use without actually deleting it; options can be unticked at any time to reinstate them and reveal the records linked to them.

**IF YOU NEED ANY HELP WITH ANY OF THESE SET UP OPTIONS  
JUST CALL THE HELP DESK ON 01603 813932.**

## 2.11. APPENDIX: An example of data available from the Profiles module

PROFILE: Overall Tracker database	
No. of current people	4,219
No. of properties currently occupied	3,253
Male / Female / Not known	2,144 / 2,073 / 2
Percentages of 'Known'	50.8% / 49.2%
White British / BME / Not known	1,420 / 922 / 1,877
Percentages of 'Known'	60.6% / 39.4%
<16 / 16-44 / 45-64 / 65+ / Not known	222 / 1,400 / 1,405 / 1,191 / 1
Percentages of 'Known'	5.3% / 33.2% / 33.3% / 28.2%
With disabilities / Without disabilities / Not known	429 / 732 / 3,058
Percentages of 'Known'	37.0% / 63.0%
General needs / Sheltered / Leasehold / Co-resident / Non-resident	2,101 / 771 / 676 / 668 / 3
Percentages of 'Known'	49.8% / 18.4% / 16.0% / 15.8%
Area A / Area B / Area C / Area D	568 / 934 / 2,112 / 605
Percentages of 'Known'	15.7% / 25.8% / 58.5%

PROFILE: Selected Groups	
<ul style="list-style-type: none"> <li>Specified areas or demographics</li> <li>With or without valid phone numbers or emails</li> <li>By personal income, employment status or benefits</li> <li>By communication preferences</li> <li>By communication history</li> <li>By participation preferences</li> <li>By participation history</li> <li>(Etc.)</li> </ul>	<p>Create your own bespoke profile on screen, download a screen shot or data file (Excel) of the analysis table.</p> <p>Export a list of all the people included in the profile, together with all their background data fields.</p>







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